Strategic Wealth Planners, LLC

What to Bring to your first Meeting with Rick

Be prepared to answer questions regarding your age, current income, hobbies, goals, philosophy on money, groups you belong to, etc.

Your documents and information discussed at our meeting will be held in strict confidence.

Recommended Documents

- Bank Statements
- Pay Stubs
- Credit Card Balances
- List of Assets
- List of Liabilities
- Completed Expense Worksheet
- Wills, Trusts, Healthcare Powers of Attorney, Health Care Proxy or Other Powers of Attorney
- Retirement Account Statements
- Social Security Statements
- Pension Benefit Statement and Booklet
- Investment Statements
- Listing of Available Investment Options in Investment and Retirement Accounts
- Homeowner and Automobile Declaration Pages
- Life, Disability or Long-term Care Insurance Polices
- Tax Return
- List of Employee Benefits